

THE UNIVERSITY OF LOUISIANA AT MONROE

A GUIDE TO COMPLETING THE PAYROLL ACTION FORM - M

Instructions for completion of each section of the “Payroll Action Form – M” (Monthly Payroll Action) are given in this guide. Also, included are explanations of the information needed in each section. This form is an essential part of the ULM employment process.

INITIAL APPOINTMENT

Certain information in the sections on the “Payroll Action Form – M” is required for the initial appointment. All items underlined below in each section **must be completed**. The other information in the sections should be completed as instructed.

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Legal Name: Complete Name as it appears on Social Security Card.

Social Security No. or CWID: All employees **must have** a U.S. Government issued Social Security Number. Initial appointment requires the social security number. All “Payroll Action Form – M” forms submitted after the initial appointment should have the **Campus Wide Identification (CWID)** rather than the **Social Security Number** (for security and privacy reasons.) Please note that the name on the social security card is the name entered into the ULM Payroll System.

Home Address & Home Phone: Local information or current information at the time the form is completed.

ULM Email: ULM Email address is required of all ULM employees. This may not be assigned at the time this form is completed.

Office Location and Office Phone: Indicate building and room number and office phone number.

Home Address, Home Phone, Office Location, Office Phone, and ULM Email should be completed if available.

NOTE: If any information in this “Employee” section changes (home or on campus) after the **Payroll Action Form – M** for an employee’s initial appointment is submitted, the employee must go to Human Resources to update their file.

This section must be completed for each employee's initial appointment.

Action: New Appointment - Initial appointment at ULM – employed at ULM for the first time.

Reappointment - continued appointment for the academic year (9 months) or fiscal year (12 months) or a reappointment of a previous ULM employee.

Salary Change – any change to salary after the initial appointment.

Resignation – resigning position.

Retirement – retiring from ULM.

Termination – ending appointment.

Other – specify (i.e., “title change only” “2010 Summer appt.” “See Remarks”, etc.) (Use “See Remarks” if more space is needed for explanation and insert the additional information in the “REMARKS” section.)

Documentation should always be attached – i.e., a copy of letter accepting appointment, letter of resignation, letter indicating retirement, etc.

Effective Date: beginning date of action indicated on the form. If an employee separates from employment (resigns, retires, or terminates), this date should be the last complete day of pay status.

Ending Date: Ending date of action for appointments which will not be continued the next academic year or fiscal year, such as, appointments by semester or summer session, appointments on grants, etc. No ending date should be entered for an appointment which will be continued the next academic year (9 month) or fiscal year (12 month).

Salary Rate: The actual gross amount to be paid for the period indicated. Appointments that are temporary or short appointments may need further clarification (use **REMARKS** section if more space is needed).

Salary Rate Period: Indicate the time period the salary rate is to be paid (i.e., 12 mo., 9 mo., 2010 Fall only, 2010 First Summer Session, month of June only, etc.).

ULS Approval No.: Number assigned to “Unclassified Position Description, Justification and Certification Form (i.e., Pre-Approval Form) sent to ULS for approval of a new position, updated position, or the replacement of a previous incumbent in a position.

Position Title: An unclassified employee's position or a position a faculty member may hold in addition to their faculty rank. (Limit the title to 30 characters).

Position No.: This will be assigned and filled in by the Budget Office when it is routed there.

Full/Part-Time: Full-time unclassified appointments and 12 month faculty appointments = 40 hours per week.
Part-time unclassified appointments < 40 hours per week.
Full-time faculty appointments are:
9 month faculty holding an administrative appointment (i.e., academic dept. head or director).
9 month faculty holding instructor rank who teach 15 hours per semester.
9 month faculty holding rank other than instructor who teach 12 hours per semester.
Anything less is a part-time appointment.
Full-time summer session appointments are:
Faculty holding any rank who teach 6 hours per session.
Anything less is a part-time appointment.

Percent of Time: Full time is 100%. Unclassified and 12 month faculty are based on 40 hours per week.
9 month faculty are 100% if they are full time.
% of time for less than 100% should be calculated based on the information given above in **Full/Part-Time**.

Years Experience: **ULM** - number of years experience employee has at ULM.
Total – number of years professional experience employee has in their field.

New or Vacant Position: Indicate if this is a new or vacant position.

Previous Incumbent: If it is a vacant position, indicate the previous incumbent.

Ending Date should be completed only if this is for an appointment which will not be continued the next academic year or fiscal year, such as, appointments by semester or summer session, appointments on grants, etc.

Previous Incumbent should be completed if it is a vacant position.

This section must be completed for all employees' initial appointment.

Highest Degree Earned: Doctor of Philosophy or Master of Arts, etc. (may use designations such as PhD, MA, etc.).

Date: Indicate month and year degree was awarded (i.e., 09/2010).

Terminal Degree: Is the highest degree earned a terminal degree? Answer "Yes" or "No."
A 'terminal degree' is the highest earned degree in a particular discipline.
In most cases, this is the PhD, but there are other terminal degrees as well
(i.e., the EdD in Education, the MFA in fine arts, and the MSW in Social Work, etc).

Degree Discipline: Major/Discipline of awarded degree.

Degree CIP Code: Code of Degree Major/Discipline. This code can be found on the Board of Regents website. It is <http://www.regents.state.la.us/pdfs/specs/cipnum2k.pdf>.

Hrs Over Masters: Hours completed after the master's degree prior to completion of a doctorate.

Institution of Highest Degree: Complete name of the institution highest degree was earned.

Institution Location: City and state the institution is located.

Hrs Over Masters should be completed for those who have completed hours after the master's degree but have not completed a doctorate.

This section is to be completed for all employees who hold faculty rank.

Tenure Status: Tenured **or** Tenure Track **or** Non-Tenure Track

Tenure Review Date: Academic year faculty member will go up for tenure (i.e., 2010-2011). Refer to Faculty Handbook for tenure procedure.

Date Tenured: Semester tenure was granted (i.e., 2010 Fall).

Tenure Discipline: The faculty member's academic discipline at the time tenure is granted.

Tenure CIP Code: Code of Tenure Discipline. This code can be found on the Board of Regents website. It is <http://www.regents.state.la.us/pdfs/specs/cipnum2k.pdf>.

Teaching Discipline: The primary subject faculty member teaches.

Teaching CIP Code: Teaching Discipline Code. This code can be found on the Board of Regents website. It is <http://www.regents.state.la.us/pdfs/specs/cipnum2k.pdf>.

Academic Rank: Instructor **or** Assistant Professor **or** Associate Professor **or** Professor
or Visiting "**one of the above ranks**"
Part-time faculty are not Adjunct. The academic rank for a part-time faculty appointment should be one of the following: Instructor, Assistant Professor, Associate Professor, or Professor. This is determined by their academic qualifications.

Rank Date: Date of the full-time faculty member's appointment at the rank indicated on the form (i.e., August 2010).

Tenure Review Date should be completed for those on tenure track appointments.
Date Tenured should be completed for those who have been granted tenure at ULM.
Tenure Discipline and **Tenure CIP Code** should be completed for those who have been granted tenure at ULM.

This section must be completed for all employees.

Assigned Department: Department employee is appointed.

Payroll Budget Code(s): Budget salary is to be paid from (Index, Fund, Org, Program, Banner Account, and Amount).
If salary is to be paid from more than one budget, this information must be submitted for each payroll budget.

Assigned Department Budget Code: Banner Index for the department employee is appointed.

Position compensatory time exempt?: Answer “Yes” or “No”
“Yes” - This position does not earn compensatory time but an exception has been approved by the University of Louisiana Board of Supervisors that this position is exempt from taking annual leave on University closure days.
Otherwise the response is “No.”

Requesting Agent: Type or print name of the requesting agent required to sign the form. If more than one Payroll Budget Code is indicated, the requesting agent for each account must sign the form on the signature lines below the typed or printed names.

Approving Agent: Type or print name of the approving agent required to sign the form. If more than one Payroll Budget Code is indicated, the approving agent for each account must sign the form on the signature lines below the typed or printed names.

REMARKS

Any additional information that is necessary or helpful for the processing of this form should be included here.

ROUTING

The form must have all required signatures and be routed as instructed below.
Sending the form directly to Payroll without all required approvals will result in it being returned to the requesting agent.

Routing on the Payroll Action Form – M: Requesting Agent to Approving Agent to Vice President to Budget Office to Human Resources to Payroll.

Depending on the division, the Approving Agent may be the Vice President in some instances.

If this is to be paid from a Foundation Payroll Budget Code, the routing will be: Requesting Agent to Approving Agent to Foundation to Grants and Contracts to Vice President to Budget Office to Human Resources to Payroll.

If this is to be paid from a Fund beginning with “2” (Grant & Restricted Funds) and “8” (Agency Funds), the routing will be: Requesting Agent to Approving Agent to Grants and Contracts to Vice President to Budget Office to Human Resources to Payroll.

PAYROLL USE ONLY

Payroll will complete this section.

Entered By:

Date:

CHANGE IN APPOINTMENT

After the “Payroll Action Form – M” for an employee’s initial appointment is submitted, the form should be completed only when there is a change in the appointment (i.e., salary change, promotion, tenure granted, etc.).

When there is a change in the appointment, you **must complete** the following information in these sections:

EMPLOYEE: Name and CWID

ACTION: Action and Effective Date

BUDGET/PAYROLL: Entire section

Then, enter the information change(s) on the form. Please **bold** or highlight all changing information.